

**KING COUNTY INFORMATION TECHNOLOGY
TRANSITION PLANNING ORIENTATION**

May 14, 2008

**10:40 am to 12:00 pm
King County Admin. Bldg. – 7th Floor Assessor's Conference Room**

A G E N D A

- | | | |
|-------|---|---|
| 10:40 | Launch DCHS – Go First Team | Patti Cole-Tindall
Ursula Roosen-Runge |
| | <ul style="list-style-type: none">• Role of the Go First Team• What is included in Stage 1?<ul style="list-style-type: none">- Timelines and frequency of meetings- Walking through the Work Products- Resources available to the Go First Team – people & technology• Where to start?<ul style="list-style-type: none">- First meeting – team formation, resources, schedule• Questions and answers | |
| 11:50 | Next Steps | Patti Cole-Tindall |
| | <ul style="list-style-type: none">- Confirm key dates | |
| 12:00 | Adjourn meeting | |



Transition Planning Resource List

The DCHS IT Reorganization Transition Planning Team will have access to subject matter experts within King County to assist with the transition planning process. This list of resources includes:

- ❑ Patti Cole-Tindall, Project Manager, IT Reorganization (Organizational Structure), Office of Information Resource Management
- ❑ Sharon Glein, Project Manager, IT Reorganization (Technical Initiatives), Office of Information Resource Management
- ❑ Chris Ynzunza, Project Support, IT Reorganization, Office of Information Resource Management
- ❑ Liz Ford, Labor Relations Manager, Human Resources Division
- ❑ Lance King, Labor Negotiator L17 IT, Human Resources Division
- ❑ Steve Fields, IT Budget Analyst, Office of Management and Budget
- ❑ Tricia Davis , IT Budget Analyst, Office of Management and Budget

**INSTRUCTIONS FOR WORK PRODUCT 1:
CURRENT STRUCTURE & STAFFING**

Purpose *The purpose of this work product is to confirm and summarize the Department's current structure and staffing. This is primarily for your internal use and for the use of the Re-organization Project Manager. You will refer back to these frequently as you do the transition planning and will build on the worksheets for later work products.*

Instructions

1. Draw (using Visio) the current IT structure within the Department identifying:
 - all IT staff, shadow IT staff, and unfilled IT positions.
 - the managers or supervisors of IT staff (whether or not the supervisor is IT) and their reporting relationship within the Department or Division.
2. Complete the following staffing workbook.
 - a. The "Current Staffing" worksheet is for listing all IT positions within each Section and Division of the Department. If there is more than one of the same classification within a section or Division indicate the number. An example is provided.

Do not abbreviate the classification name. This will allow you to sort by classification in the future if needed and will allow the Project Manager to create KCIT - wide summaries if needed. If you use abbreviations for titles, division or section be consistent in the abbreviation you use.
 - b. The "Dept Summary" worksheet is for summarizing by classification all positions within the Department, irrespective of the Division they work in. Provide subtotals by classification.

WORK PRODUCT 1 - CURRENT STAFFING WORKSHEET

Department [Fill In Name]
As of: [Fill In Date]

#	Current Title	Classification (No abbreviations)	Current Division	Curren
<i>Examples:</i>				
3		Database Administrator Senior	Finance & Business	Operations
2	LAN Administrator	Desktop Support Specialist Senior	Administrative Services	

WORK PRODUCT 1 - DEPT IT SUMMARY

Department [Fill In Name]

Staffing Summarized by Classification

#	Classification <i>(No abbreviations)</i>
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subtotal by classification

INSTRUCTIONS FOR WORK PRODUCT 2: FUTURE STRUCTURE & STAFFING

Purpose *The purpose of this work product is to describe and summarize the Department's future structure and staffing. This structure will meet the criteria set in the Reorganization Plan and be modeled after the "Department X" structure described in the Plan.*

Instructions

The suggested approach is to use your "current staffing" worksheet developed in Work Product 1 as the foundation for organizing staff in the functions described in Department X:

*Network Operations
Database and Systems Operations
Business Solutions
Finance and Administration*

Once you have done that draw and refine the departmental structure as needed. Apply the criteria to refine the staffing and supervisory structure. You may also refine the structure by moving staff between functional areas to best support your unique Departmental needs or by creating an additional defined functional area.

1. Complete the following staffing workbook to identify.

- a. Take the "Current Staffing" worksheet and add a column to permit you to organize and sort staff into the different functional areas. (See Future Staffing Worksheet for an example). Add rows as needed.
 - Group the current staff into those functional areas.
 - If a different title is needed for certain positions suggest that.
 - If new positions that do not currently exist are needed add them. If a new position is added put NEW in the cell for "current title". Suggest the classification or leave that cell blank if you are not clear about it.
 - If a position is not longer needed delete it and indicate "deleted" in the column for "future title".

Remember not to abbreviate the classification name and DO NOT change the classification of any current position that is continuing in the future structure. (You will have an opportunity in the assessment of transition issues to identify if you believe the classification is a problem.)

This worksheet is formatted to print on legal size paper.

- b. The "IT Staffing Summary" worksheet is for summarizing by classification all positions within each of the IT sections in the future structure.
2. Draw (using Visio) the future IT structure within the Department identifying:
 - all IT staff
 - the managers or supervisors of IT staff
3. Write a brief narrative about any differences in the proposed Department IT structure from either Department X or the criteria. The narrative should identify the specific differences and provide the rationale for them.

WORK PRODUCT 2 - FUTURE STAFFING

Department [Fill In Name]
As of: [Fill In Date]

IT Section/ Functional Area	#	Current Title	Future Title	Classification (No abbreviations)
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Network Operations

Subtotal 0

Database and Systems Operations

Subtotal 0

Business Solutions

IT Section/ Functional Area	#	Current Title	Future Title	Classification (No abbreviations)
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Subtotal
Finance & Administration

0

Subtotal

0

WORK PRODUCT 2 - FUTURE STAFFING

Department [Fill In Name]

As of: [Fill In Date]

Staffing Summarized by Classification

IT Section/ Functional Area	#	Classification (No abbreviations)
Network Operations		

Subtotal

**Database and Systems
Operations**

Subtotal

Business Solutions

Subtotal

Finance & Administration

**INSTRUCTIONS FOR WORK PRODUCT 3:
IDENTIFY CRITICAL MATRIX RELATIONSHIPS**

Purpose: *The purpose of this worksheet is to help you identify and describe the **critical** cross-department, intra-department and cross-functional working relationships that should be developed and/or supported to successfully implement the IT reorganization and improve how the work of IT gets done. These "matrix" relationships are overlaid on the hierarchical structure. That structure describes the formal accountability. The matrix relationships are just as important to achieving the desired results of the reorganization. (For a more complete description of Matrix relationships see pages 52 - 56 of the Recommended Organization Structure and Plan for Capacity Building and Transition.)*

Of particular importance are working relationships that will lead to:

- Increased and faster information sharing*
- Improved efficiencies through team work*
- Increased innovation through collaboration.*

Descriptions of these working relationships will later be translated into revised job expectations for managers and staff. Training to support the development of newly identified working relationships will also be provided as needed.

Instructions:

1. Use the following worksheet to describe the desired matrix working relationships. Use as many pages as needed.
2. In the first row of the worksheet indicate the department, division, program, or functions (as needed), that should develop either new or stronger working relationships with each other. Put a check in the appropriate box to indicate the **type** of relationship it should be. The definitions of these types of working relationships are as follow:

<i>Networking</i>	When information is exchanged for mutual benefit, but sharing of mutual goals is not required. Examples of networking are brown bag lunches, seminars, and blogs.
<i>Coordination</i>	When information is shared and processes are changed to support mutual goals. Examples of where coordination would be useful are improvements to procurement or

the project review process.

Collaboration When information is exchanged, processes changed, and responsibility and accountability is shared to support mutual goals. Examples of where collaboration would be useful are enterprise application development or improvements to service desk functions.

3. Give examples of why or how the new or improved working relationship could be important.
4. Describe briefly how it might change or enhance the roles and responsibilities of specific position (or types of positions.) For example, a manager might be expected to coordinate more frequently with another manager in another department, or an application developer might need to have the adaptability to move between Divisions within their Department or between Departments as their skills are needed.
5. You may find it useful to summarize the working relationships in a drawing or matrix - please feel free to do so.

**WORK PRODUCT 3 – WORKSHEET:
DESIRED WORKING RELATIONSHIPS**

Relationship between

[fill in Dept/Div/section]	[fill in Dept/Div/section]	[fill in Dept/Div/section]	[fill in Dept/Div/section]
[fill in function]	[fill in function]	[fill in function]	[fill in function]

Networking ☐ Coordination ☐ Collaboration ☐ Other _____
(check the appropriate box to describe the nature of the relationship)

Examples

Give one or more examples of why and how this working relationship would be important:

Relationship between

[fill in Dept]	[fill in Dept]	[fill in Dept]	[fill in Dept]
[fill in function]	[fill in function]	[fill in function]	[fill in function]

Networking ☐ Coordination ☐ Collaboration ☐ Other _____
(check the appropriate box to describe the nature of the relationship)

Examples

Give one or more examples of how this working relationship would work, and how it would be helpful:

**INSTRUCTIONS FOR WORK PRODUCT 4:
CRITICAL TRANSITION ISSUES**

Purpose: *The purpose of this work product is to identify for your department the **critical transition issues** which **must be addressed for a successful IT reorganization**. The issues you identify will be collated and evaluated along with those identified by the other Executive Branch Departments and OIRM. The aggregated issues will be reviewed by the Reorganization Steering Committee. Further direction for transition planning around these issues will come to you from the Re-Organization Project Manager in Stage 2 of the Transition Planning effort.*

Instructions:

There are three components to your work on critical transition issues each with a separate worksheet:

- A. Identification of the major issues related to human resources, processes and systems*
- B. Identification of issues related to classification of specific positions*
- C. Identification of the critical success factors – what needs to be in place for the Department to reorganize IT smoothly and successfully*

Instructions for each follow.

Worksheet A.

1. Use Worksheet A to identify the critical transition issues for your department. One page is headed Human Resources and the other Processes and Systems. Use as many pages that you need of either.
2. The following table outlines the types of issues and concerns you may wish to address. This is provided **only** as a guide. If you have an issue and you are not sure where it fits, put it where it fits best for you. Many issues could be put in more than one category – do not agonize over it. You may also add an "other" category if you have an issue that does not fit in the other two.

Issue Category	Examples of specific types of concerns to be identified or questions to be addressed
Human Resources	1. Labor issues 2. Management and supervisory skills

	or experience 3. Staff skills or expertise 4. Mindsets and beliefs (organizational culture) 5. Staffing levels 6. Working relationships/matrix requirements
Processes and Systems	1. Finance & Budgeting 2. Centralization of procurement
Other	

3. Identify issues within each category by comparing the current staffing and structure of IT within your Department (Work Product 1) and to the desired structure and staffing (Work Products 2 and 3) asking yourself these types of general questions:
 - What are the barriers to moving from the current state to the desired state?
 - What will need to change to move from the current state to the desired state?
 - What would help move us to the desired state?
4. In the description of the issue indicate first who or what the issue most affects. This may be a group of staff, a division or business line, the implementation of a new technology etc.
5. Then describe the issue as fully as possible while being necessarily brief. Remember that your audience includes people who are not necessarily familiar with your department.
6. For each issue you describe indicate with a X in the appropriate column on the left of the page, whether the is an is a Department level issue - i.e. it can be resolved by the Transition Team, and responses to it can vary by Department; or whether it is a System Level issue and should to be resolved in the same way across the IT system.
7. A place is also provided on the worksheet for any preliminary ideas the team may have about ways to address the issues. This does not need to be completed at this time - but is a way to capture thoughts you may have while you are discussing the issue, so they won't get lost for future use. This will be helpful to you in the next stage of planning.

Worksheet B - Position Classification Issues

1. Working with your "Future Staffing Worksheet" completed as part of Work Product 2, list by IT Section or function each position whose classification you believe should be reviewed and possibly changed.
2. For each position that you list describe briefly why you think the position should be reviewed. See Worksheet B for an example. Note that the Worksheet is formatted to print on legal size paper.

Worksheet C - Critical Success Factors

1. The Reorganization Plan identifies KCIT-wide critical success factors, before and during transition implementation. These are described on pages 81 - 83 of the Plan.
2. Start by reviewing and discussing them.
3. Then identify for your Department the factors which you believe are critical to success, before initiating the re-organization and during implementation. You may build on those identified in the Plan, making them specific to your Department, or add to them. List the factors, including a brief description on Worksheet C.

WORK PRODUCT 4 WORKSHEET A:
CRITICAL TRANSITION ISSUES – HUMAN RESOURCES

Dept Level Issue	System Level Issue	ISSUE	Preliminary Strategy Ideas
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	

WORK PRODUCT 4 WORKSHEET A:
CRITICAL TRANSITION ISSUES – PROCESSES AND SYSTEMS

Dept Level Issue	System Level Issue	ISSUE	Preliminary Strategy Ideas
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	
		<i>Name Issue:</i> <i>Explain the issue:</i> <i>Who or what does it most affect?</i>	

WORK PRODUCT 4 - WORKSHEET B CLASSIFICATION ISSUES

Department [Fill In Name]

List of Positions Whose Classification Should be Reviewed

IT Section/ Functional Area	#	Current Title	Future Title	Classification <i>(No abbreviations)</i>
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Network Operations

Database and
Systems Operations

Business Solutions

Finance &
Administration

WORK PRODUCT 4 – WORKSHEET C:
CRITICAL SUCCESS FACTORS

Critical Success Factors Before Transition Implementation

Critical Success Factors During Transition Implementation

